

Account View My Documents

User Guide Supplement

My Documents, within Account View, is your online vault for documents you would like to share with your financial advisor who assists you with your investment decisions. You can use **My Documents** for documents like a 401k statement from your company, a summary document for bank statements, real estate planning documents or even a copy of your driver's license or passport.

With **My Documents**, you can trust that these documents are kept private and confidential, and are held securely in Account View. The following pages are instructions for how to use **My Documents** to upload and access documents.

1

On the home page of Account View, select the **My Documents** tab

Welcome **Brandy** Portfolio Value: \$23,367.64 \$0.00 Messages Print Settings Help Logout

Initech Financial Advisors Powered by: **LPL Financial** **JIM RODGERS** (555) 555-1212 Send Email | Secure Message

Home Accounts Positions Transactions Statements **My Documents** Quote: Enter Symbol Go

Account Summary					
Nickname	Account #	Held At	Value(\$)	Change(\$)	Change(%)
WOLTERS JAY 0002906	000290616	PRUDENTIAL	23,367.64	\$0.00	0.00 %
Total Portfolio Value			\$23,367.64	\$0.00	0.00 %

Prices are delayed 20 minutes. All times are Eastern.

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Announcements from LPL®

In **My Documents**, you can upload documents via the **Upload Document** link
You can view the uploaded documents by selecting **View**, found under the **Action** column

Welcome **Brandy** Portfolio Value: \$58,874.52 \$0.00 Print Settings Help

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Home Accounts Positions Transactions Statements **My Documents** WealthVision Quote: Enter Symbol Go

Documents

All Documents

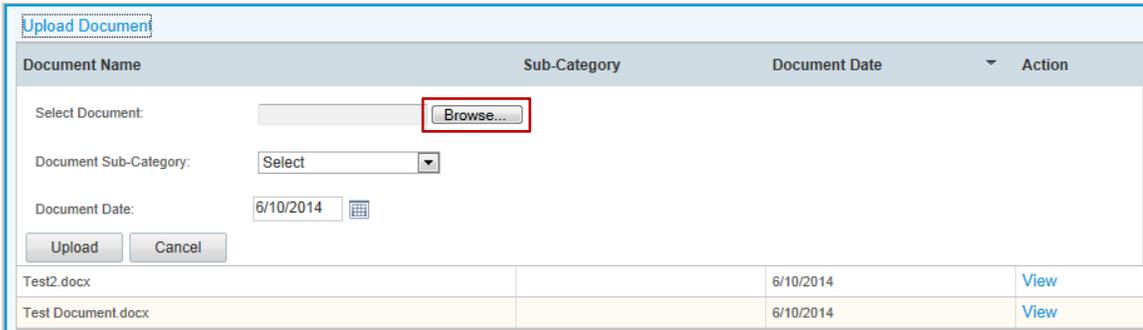
STACIA MAY

Upload Document.

Document Name	Sub-Category	Document Date	Action
No records to display.			
Account 4479-0262 - STACIA MAY			
Account 5084-7789 - STACIA MAY			
Account 5546-5544 - STACIA MAY			
Account 7578-1793 - STACIA MAY			
Account 5836-7089 - STACIA MAY			
Account 2965-1887 - STACIA MAY			
Bush, Billy			
Account 1789-4301 - BUSH BILLY			

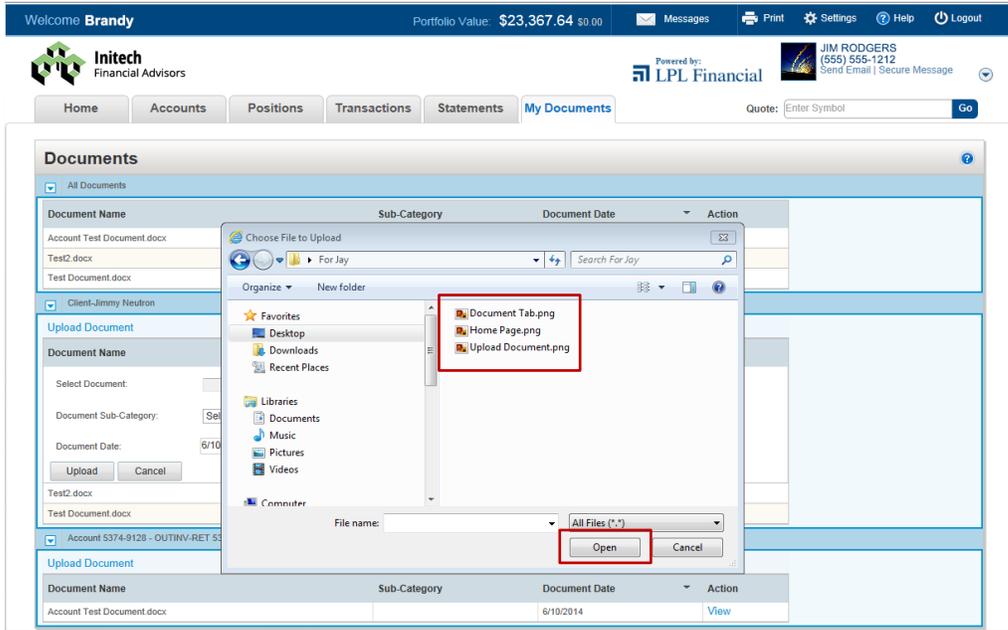
2

To upload a document, select **Upload Document**
The area expands and you can now **Select the Document** you wish to upload
Select the Browse button



3

Navigate to the file folders on your computer to find the file you wish to upload
Highlight the file and select **Open** to upload to **My Documents**



4

Select **Upload** to store the document in **My Documents**

The screenshot shows the 'My Documents' section of the LPL Financial interface. It features three expandable document lists. The middle list, titled 'Client-Jimmy Neutron', is expanded to show an 'Upload Document' form. The form includes fields for 'Select Document' (with a file path and 'Browse...' button), 'Document Sub-Category' (set to 'Client Documents'), and 'Document Date' (set to 6/10/2014). Below these fields are 'Upload' and 'Cancel' buttons. The 'Upload' button is highlighted with a red rectangular box. Below the form is a table with columns 'Document Name', 'Sub-Category', 'Document Date', and 'Action'. The table contains two rows: 'Test2.docx' and 'Test Document.docx', both dated 6/10/2014, with a 'View' link in the 'Action' column.

5

Once the file upload has completed, the **Upload Successful** prompt will appear
To view the document, select **View**
If you wish to delete the document from **My Documents**, please contact your Financial Advisor

This screenshot shows the same 'My Documents' page after a successful upload. A green checkmark icon and the text 'Upload Successful.' are displayed in a red-bordered box. The 'Client-Jimmy Neutron' document list is now expanded to show three documents: 'Upload Document.png', 'Test2.docx', and 'Test Document.docx', all dated 6/10/2014. Each document has a 'View' link in the 'Action' column. The 'Upload Document' form is no longer visible, indicating the upload process is complete.